

RECORDS MANAGEMENT HANDBOOK

**THE FLORIDA STATE
RECORDS CENTER**



**STATE OF FLORIDA
DEPARTMENT OF STATE
Division of Archives, History
and Records Management**

25 YEAR RE-REVIEW

FOREWORD

The Department of State, Division of Archives, History and Records Management, operates one of the most modern records centers in the country. The Center, completed in the summer of 1971, provides the State with a potent management weapon to use in combating waste and inefficiency in paperwork.

The Center is designed to provide safe and secure storage for noncurrent records at the lowest possible cost to the State. It is estimated that half of the records of the State, which have to be retained because of administrative, legal, or fiscal requirements, fall into the noncurrent category and should be stored in the Records Center. Agencies are encouraged to transfer their noncurrent records to the Center as soon as possible so that valuable floor space and equipment can be released for more important uses.

This handbook has been prepared to assist agencies in using the Center facilities. The handbook provides information about transferring records to the Center, using them while stored in the Center, and disposing of them when they are no longer needed.

The Department of State is proud of the Center and the services offered. The Department pledges wholehearted cooperation with State agencies in bringing efficiency and economy to the State's paperwork activities.

Richard (Dick) Stone
Secretary of State

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I. WHY FLORIDA HAS A RECORDS CENTER

1. Problem of Noncurrent Records

Noncurrent records are those records which have little or no current administrative use but which, because of legal, fiscal, or other requirements, cannot be disposed of until some future date. Reference to the records has either ceased or is minimal.

Even though these records have served their administrative needs, agencies are required to retain them. Some are placed in storage space that the agency may have, but many are retained in high-cost office space because no alternative exists. Some are removed from file cabinets and placed in transfiles or boxes, but many are held in expensive filing equipment.

Keeping noncurrent records in office or prime storage space is a costly practice. To illustrate: a four drawer legal size file cabinet holds about eight cubic feet of records when completely filled; the same cabinet requires nearly eight square feet of space (including aisle and access space) to house it; therefore it takes about one square foot of floor space to support one cubic foot of records in filing equipment.

With office space costing \$4.00, \$5.00, or even \$6.00 per square foot annually, it follows that to keep a cubic foot of noncurrent records in office space costs a like amount.

Using filing equipment for the keeping of noncurrent records is also wasteful. The minimum cost of file cabinets today is \$60 for lettersize and \$75 for legal size. Often the equipment costs more. When noncurrent records are kept in filing equipment, additional equipment must be purchased to house the new current records that are being generated.

2. The Records Center Concept

Shortly after World War II, both government and industry became painfully aware of the growing pressure of paper records in the office. Concerted effort was directed toward controlling and reducing the paper accumulation. Records were appraised for

retention value; useless outdated records were destroyed; but the question of what to do with noncurrent records still remained.

The only logical answer was to take the noncurrent records out of office space and keep them in low-cost storage. However, when an agency or organizational element procured and serviced its own storage area, potential savings became slight, or even vanished. Thus the pooling concept emerged, under which all agencies of a government, or agencies in a specific geographical location, used a common storage facility and a single cadre of employees to store and service all records. The economic advantages of this arrangement were quickly evident.

At first the centers were housed in whatever warehouse space was available. However, quite often the space offered little protection against fire, was difficult to work in because of heat or cold, and lacked the spatial characteristics necessary to house the volume of records needed for economical operation. As a result, the concept of a functionally designed center developed. During the last 15 years, center design has advanced to a point where records now can be stored in a center at 10 percent, or less, of the cost of keeping them in office space. Also, the center of today is so constructed that fire and security hazards have been reduced to the absolute minimum.

Thus, the records center has become an extension of the individual agency's record keeping system. Records placed in the center remain in agency custody and are subject to any stipulations set by the agency. The records may be obtained on loan or permanently withdrawn at any time. If required, center personnel perform reference service for stored records. Truly the center has become the most efficient and economical device that a government or business can find for solving the noncurrent record problem. (*See Figure 1.*)

3. Legal Basis for Florida State Records Center

In 1967 the Florida Legislature passed the Florida Archives and History Act (Chapter 267, F.S.).

The Act, which established the State's Records Management Program, empowered the Division of Archives, History and Records Management to operate a records center (or centers). The center as envisioned by the Legislature is an integral part of the program to bring efficiency and economy to the management of public records in the State of Florida.

4. The Florida State Records Center

The Center was designed specifically for the storage and servicing of noncurrent records. Maximum utilization of storage space is achieved through shelving height and layout. The storage area holds more than five cubic feet of records for each square foot of floor space, including all aisle and access space.

The building is completely fireproof and has the most modern equipment available for the automatic detection and control of any fire that might start among the paper records. The detection system is tied in with the Fire Department for immediate response.

Building design provides for maximum records security. Access to the storage area is controlled, eliminating the possibility of unauthorized use of records. The level of security provided for stored records will be equal to, and in many cases better than, that which agencies can offer.

5. Services Available

Noncurrent records storage is available at *no cost* to state government agencies. Facilities are available to store microfilm and magnetic tape as well as conventional paper records. A vault with automatic environmental controls (temperature and humidity) insures proper storage conditions for the microfilm and magnetic tapes.

The Center furnishes the cartons for storing paper records and provides a pickup service for records from agencies in the Tallahassee area.

Reference service is also provided *without cost* for noncurrent records accepted for storage. Daily delivery service is provided to agencies in the Tallahassee area.

The combined service package of storage and reference provides each agency with basic resources for controlling the noncurrent records problem. *And at no cost to the agency.*

The Center offers a central microfilm service. It can provide nearly every type of microfilm product. The service, which is available at cost, will be particularly useful to agencies having one-time, intermittent, peakload, or less than full-time filming requirements.

The Center has equipment for shredding records. Agencies having records which must be mutilated at time of disposal can have them shredded at the Center at no cost.

6. Agency Responsibilities

The Florida Archives and History Act (Chapter 267, F.S.), which authorizes the records center, also places with the agencies certain responsibilities. Section 267.041(6) F.S., requires that each agency "cooperate . . . in complying with the provisions of this chapter" and "establish and maintain an active and continuing program for the economical and efficient management of records." As authorized by the basic legislation, the Department of State has issued regulations pertaining to records management (Division 1A, Florida Administrative Code). Section 1A-27.07 requires that each agency of the state government shall designate a Records Management Liaison Officer (or officers) responsible for the development of the agency's records management program. This officer will provide the essential communication and control needed to insure the optimum use of the records center facilities and services. The Records Management Liaison Officer should establish internal procedures for the orderly transfer of records to the Center and for the central clearance of reference requests.

I. WHY FLORIDA HAS A RECORDS CENTER

1. Problem of Noncurrent Records

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At first the centers were housed in whatever warehouse space was available. However, quite often the space offered little protection against fire, was difficult to work in because of heat or cold, and lacked the spatial characteristics necessary to house the volume of records needed for economical operation. As a result, the concept of a functionally designed center developed. During the last 15 years, center design has advanced to a point where records now can be stored in a center at 10 percent, or less, of the cost of keeping them in office space. Also, the center of today is so constructed that fire and security hazards have been reduced to the absolute minimum.

Thus, the records center has become an extension of the individual agency's record keeping system. Records placed in the center remain in agency custody and are subject to any stipulations set by the agency. The records may be obtained on loan or permanently withdrawn at any time. If required, center personnel perform reference service for stored records. Truly the center has become the most efficient and economical device that a government or business can find for solving the noncurrent record problem. (See Figure 1.)

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Figure 1. Records Center Interior

II. SELECTING RECORDS FOR TRANSFER TO THE RECORDS CENTER

1. The Records Retention Schedule

When the records of an agency are completely covered by records retention schedules, there is no problem in deciding which records should be transferred to the Records Center. These schedules, which establish the official life span for records, specify which records are to be transferred to the Center and when to transfer them. See Records Management Handbook, Retention and Disposition of Public Records.)

The determination as to whether records are to be transferred to the Center is based on three factors:

- Frequency of reference,
- Period to be retained before destruction, and
- Cost of transfer (such as shipping charges from a remote office).

These factors should be weighed carefully at the time the records retention schedule is developed. Once the schedule is prepared and approved, the flow of records from an agency to the Records Center becomes a matter of routine procedure.

2. Guidelines for Selecting Records

As a general rule, noncurrent records should be transferred to the Records Center just as soon as the reference activity drops to the level which qualifies them for "noncurrent" status, not more than one reference per file drawer per month. When this level has been reached, the Records Center staff can assume the reference work.

There will be special instances when records with a higher reference rate will be accepted by the Center for storage. Sometimes the transfer of "semi-active" records is economically worthwhile, particularly if the release of high priced office space and equipment results. Each proposed transfer is considered on its own merits.

There is also a general rule relating to the minimum time records should be stored. In most instances, *it is not economical to transfer records if they are to be stored for less than two years before*

being destroyed. There may be exceptions to this rule, too, but each exception must be judged separately.

In the Tallahassee area the cost of transporting records to the Center is not a factor in determining the feasibility of storing records. The Florida State Records Center provides pickup service at no cost to the agencies.

For offices beyond the limits of metropolitan Tallahassee, transportation of records to the Center is an agency responsibility. For those offices, long term storage is generally economically advantageous even when shipping costs are considered. However, agencies should evaluate carefully the economics of short term storage where transportation costs are involved. It is possible that the cost of getting the records to the Center may offset any savings achieved by freeing space and equipment.

Small quantities of records (less than one cubic foot) should not be transferred to the Center. They should be retained by the agency until at least one cubic foot accumulates or until the retention period expires and the records can be destroyed.

3. Reference Requests and Records Security

Noncurrent records should not be retained in agency offices or storage space because of concern about urgent handling of infrequent reference requests or the security of records.

The Records Center service is designed to provide rapid handling of either written or telephoned requests. (See Section V. *Obtaining Reference Service.*) As for records security, the Center observes and enforces any security or use restrictions placed on the records by the transferring agency.

4. File Breaks

Files should be terminated or cut off periodically to facilitate their transfer to storage and ultimate disposal in uniform chronological blocks.

This technique is called "breaking" files, and simply means that on a given date a new set of files is established for a subsequent period. Files can be "broken" annually, biannually, or for even a longer period, depending on the rate at which they accumulate. Different colored labels may be used on folder tabs for records which accumulate in large annual blocks to distinguish one time period from another.

5. Completed Case Files

Case files constitute approximately 80 percent of the records in government. Experience shows that closed case files are seldom referred to more often than the maximum rate established for reference service (once a month per file drawer). Case files are usually closed when a given event occurs, e.g., a claim is settled, a purchase order is paid. Closed case files should be transferred to the Center as quickly as practicable to achieve optimum savings in space and equipment.

6. Record Types

Although the storage facilities in the Center are geared primarily to conventional files or documents

in standard center storage cartons, the Center provides storage for other types of paper records, such as punch cards, ledgers, maps, engineering drawings, etc. Facilities are also available for storing microfilm and magnetic tapes.

7. Advice and Assistance on Transfers

Each agency has a Records Management Liaison Officer responsible for developing the agency's records management program. In larger agencies, Records Management Liaison Officers are also appointed at Division level. These officers, or staff members designated by them, provide internal agency guidance and direction on transfers.

Forms required to transmit records to the Center should be approved by the liaison officers. If an employee other than the Records Management Liaison Officer is designated for transfer approval purposes, the name and telephone number of the employee should be given to the Center.

Advice and assistance may also be obtained from Center staff.

III. GETTING RECORDS READY FOR SHIPMENT

1. Records Storage Cartons

Standard cardboard containers are to be used to transfer records to the State Records Center. The efficient use of storage space in the center depends on optimum use of available shelf area. The standard carton is designed to achieve this. Unless an agency urgently requires immediate removal of its records, it should ship them in prescribed containers rather than in non-standard boxes. The standard carton has inside dimensions of 10 inches by 12 inches by 15 inches and holds one cubic foot of either letter or legal size records. A carton is needed for each cubic foot of files being transferred.

2. Obtaining Cartons

Standard cartons may be obtained without cost to the agency from the Records Center. Requests for cartons should be made far enough in advance of transfer to insure they will be on hand when packing begins. The cartons will be shipped or delivered unassembled.

3. Assembling Cartons

The bottom of cartons should be secured either by gummed tape at least two inches wide or by machine-applied wire stitching. The tape should be placed lengthwise on the outside, after the flaps on both ends of the carton have been folded inside. (See Figure 2.) The tape should extend at least two inches up the ends of the carton for extra strength.

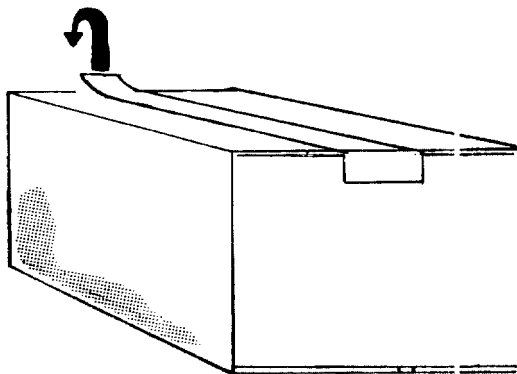


Figure 2. Assembling Carton

4. Screening Record Material

Before putting records into cartons, it is advisable to screen-out any records which have met retention period requirements and are ready for destruction. Generally, such screening will result in storage cost savings. However, the cost of screening should be computed to ascertain that it does not exceed projected savings. In the long run, the best approach is to segregate records with different retention periods at time of filing so that screening is not necessary.

5. Packing Records

Without disturbing the existing filing arrangement, pack records firmly in the box. Do not force them. To make future reference easier, they should not be packed so tight as to hinder withdrawal. Do not place file folders on top of file folders within the box. Place the file folders in an upright position with lettersize folders across the 12-inch way, facing the front of the container (the unstitched 12-inch side of the container is considered the front) or with legal-size folders across the 15-inch way, facing the left side of the container. Space should be allowed within the carton for subsequent interfiles if such additions are contemplated. Do not place records with different retention periods in the same carton. Neither should records from more than one agency be packed together.

6. Closing Cartons

To close the top of the cartons, simply tuck the flaps alternately over and under each other. (See Figure 3.)

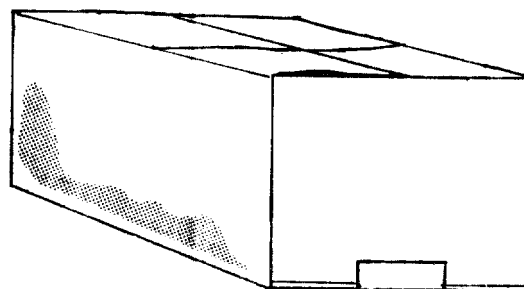


Figure 3. Closing Carton

AGENCY DEPARTMENT OF EMERGENCY ASSISTANCE DIVISION OF PLANNING	ACC. No. 700125	CARTON NO. 7
SERIES DISASTER RELIEF PLANNING FILES	INCL. DATES Jan 1, 1969 to Dec 31, 1969	FROM - TO Alachua - Lazy Lake
DESCRIPTION FILES ACCUMULATED FROM PLANNING OR ACTIONS TAKEN TO PROVIDE ASSISTANCE TO CIVIL AUTHORITIES OR AGENCIES BECAUSE OF NATURAL DISASTERS. INCLUDED ARE PLANS, INSTRUCTIONS, REPORTS OF ACTION TAKEN IN NATURAL DISASTER, OR OTHER DOCUMENTS RELATING TO THE USE OF MILITARY RESOURCES IN NATURAL DISASTERS. FILE ARRANGEMENT: ALPHABETICAL BY CITY NAME		
<small>State of Florida Department of State Division of Archives, History and Records Management Form DS-RM-200 - 1/70</small>		

Storage Carton Label

Figure 4. Carton Label

7. Labeling Cartons

Container labels as shown in *Figure 4*, are required. Fill in as follows:

Agency — Enter the name of the agency. Also indicate the organizational element to which the records belong.

Acc. No. — Leave blank. This space is used by the Records Center to indicate accession number, assigned at time of transfer.

Carton No. — Enter the number assigned to the carton by the transferring agency. (See 8 below.)

Series — Enter the official record series title, as shown on the approved schedule, Form DS-RM 105.

Incl. Dates — Enter the period of time (inclusive dates) covered by the records in the record series. Example: July 1, 1963 — June 30, 1967.

From - To — Show the range of records in the carton, such as the beginning and ending case file numbers, or alphabetical designations for the first and last files.

Description — Enter here any additional information needed to identify the contents of the carton.

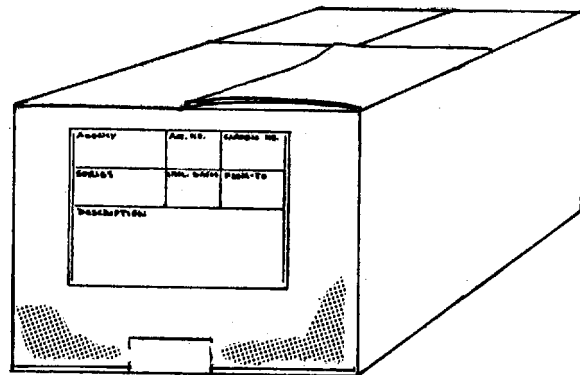


Figure 5. Label on Carton

The label is to be affixed to the front of the carton as shown in *Figure 5*. Labels should be requested from the Records Center when cartons are obtained.

8. Numbering Cartons

Cartons are to be numbered consecutively starting with "1", for each transfer. When the cartons reach the Center, the staff will assign an accession number to each transfer and a Records Center box number to each box in the transfer. This information will be entered on the copy of the records transmittal and receipt returned to the agency after records are received at the Center.

9. Finding Aids

The records should be accompanied, where possible, by any relevant finding aids, such as indexes, which will assist the Center in performing reference service. However, if files are quite active, indexes may be retained by the agency. The Center should be notified of any finding aids retained by the agency.

10. Packing Odd-sized Records

Records smaller than conventional letter or legal size files should be placed in standard center cartons, using the most practical packaging arrangement. Punchcards should be packed and transferred in the boxes in which the blank cards were received from the manufacturer.

Oversized records, such as bound ledgers and similar volumes, should be tied in bundles with sturdy cord. Identification tags should be attached. Each bundle should be handled as another box in the numbering sequence. The number should be written on the tag, along with any other necessary descriptive data. Large drawings may be rolled in brown paper, taped and labeled.

Consult the Center concerning packing arrangements for microfilm and magnetic tapes; also ask for Center assistance on any problem relative to packaging odd-sized records.

11. Filing Cabinets

As previously indicated, records should not be transferred to the Center in filing cabinets or other types of filing equipment. The Center is designed for maximum storage capacity by using cardboard containers on metal shelving. All records should be removed from file cabinets and boxed before leaving the agency.

12. Shipping the Records

Records in the Tallahassee area will be picked up by the Center truck. Agencies beyond the Center pickup service must make their own arrangements for transportation and bear the cost of shipping. When the Center truck is not used, shipments are ordinarily made by United States mail or by commercial motor or rail freight with costs borne by the transferring agency. (See Figure 6.)

ESTIMATING WEIGHT AND VOLUME	
•	One Center carton holds 1 cubic foot of paper records weighing about 30 pounds average; however, tabulating punchcards weigh in excess of 50 pounds per cubic foot;
•	One ton of records average 70 cubic feet;
•	One cubic foot of records approximates 3,000 sheets of paper;
•	One cubic foot of records approximates 10,000 tabulating punchcards;
•	A lettersize file drawer holds 1½ cubic feet of records, while a legal size drawer holds 2 cubic feet.

Figure 6

When records are picked up in the Tallahassee area the Center will furnish specially designed handtrucks for loading the records at the agencies. The use of these handtrucks makes it possible to deliver the cartons to the appropriate place in the Center storage area without manual loading or off loading of the truck.

Shipments of records by commercial carriers should be loaded into the vehicle in reverse numerical sequence so that when the shipment reaches the Center the first carton to be taken off will be "1" and the others will follow in numerical sequence. Records can be moved directly to the shelves without unnecessary handling.

IV. DOCUMENTING THE TRANSFER

1. Initiating the Request

The agency making the transfer is responsible for alerting the Records Center and for preparing the necessary transfer forms. All transfers should be initiated by the appropriate Records Management Liaison Officer or by staff members who have been designated for this purpose.

Since the Center must plan for the pickup (Tallahassee area) and warehousing of the records, as much advance notice as possible is needed. A telephone call or a letter indicating the proposed date of transfer and the approximate volume of records involved will suffice. Of course, if the official transfer forms (*See Figures 7 and 8*) can be prepared and submitted well in advance of the shipment, this is most helpful. Normally, the transfer forms are to be sent to the Center 24 to 48 hours in advance of shipment pickup.

2. Forms Used

An agency desiring to transfer records to the Records Center will prepare Form DS-RM 201, Records Transmittal and Receipt. If additional space is needed, Form DS-RM 202, Records Transmittal and Receipt (Continuation), is also used. These forms (*Figures 7 and 8*) serve to:

- Record the transfer of records to the Records Center, subject to any legal or other restrictions on their use which an agency may impose and,
- Provide an inventory sufficiently detailed to aid the Center in providing future reference service required by the transmitting agency.

Copies of Forms DS-RM 201 and 202 may be obtained from the Records Center.

3. Forms Distribution

Prepare an original and two copies of the transfer form(s) for each shipment of records. Submit the form(s) to the Records Center at least 24 to 48 hours in advance of shipment. When the records have been received and checked in by the Center, one copy of the form(s), signed by a Center official, will be

returned to the transferring agency. This copy, the agency's receipt, provides the agency with the accession number and the Records Center box numbers which must be cited when making future reference to the records.

4. Preparation in Agency

The transmitting agency is responsible for filling out the transfer forms; however, Center personnel, upon request, will assist in preparing forms. Prepare the documentation carefully; make it as meaningful as possible. Remember that the information supplied is the key to serving agency reference needs in the future.

5. Explanation of Items

Items 1-4. Accession Number, Records Group Number, Date Received, Received by. The accession number and records group number (which distinguishes the records of one agency from all others), as well as the date of receipt and the signature of the Center official receiving the shipment are filled in at the Records Center.

Item 5. From. Enter the complete name of the agency, as well as the full mailing address.

Item 6. Agency Contact, Location, Telephone Number. Enter the name of the person immediately responsible for the transfer of the records. This is the person the Center will contact to make arrangements for the pickup. Show also the building and room number for the agency contact, as well as his telephone number.

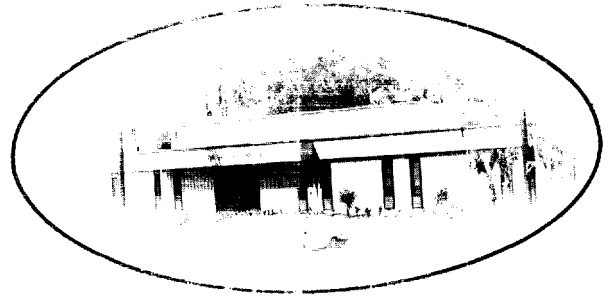
Items 9-11. Approving Official, Title, Date. The approving official signs here. This will be the Records Management Liaison Officer or a designated staff member. Show his title and the date the transmittal is signed.

Item 12. Restrictions on Use of Records, If Any: Particular attention should be given to this item. The specific restrictions which an agency imposes on transfer of records should rest on either legal

STATE OF FLORIDA DEPARTMENT OF STATE Division of Archives, History and Records Management Form DS-RM 201 (6-71)		TRANSMITTAL AND RECEIPT FOR RECORDS STORAGE		PAGE 1 OF 2 PAGES	
SEND ORIGINAL AND TWO COPIES TO: DEPARTMENT OF STATE DIVISION OF ARCHIVES, HISTORY AND RECORDS MANAGEMENT FLORIDA STATE RECORDS CENTER TALLAHASSEE, FLORIDA 32304			ITEMS 1-4 TO BE COMPLETED BY RECORDS CENTER 1. ACCESSION NO. 700125 2. RECORDS GROUP NO. 14 3. DATE REC'D. 7-15-71 4. REC'D BY (Signature) <i>D. R. Brooks</i> 5. FROM (NAME AND ADDRESS OF TRANSMITTING AGENCY) Department of Emergency Assistance Division of Planning 400 Redwood Street Tallahassee, Florida 32303		
6. AGENCY CONTACT Mr. James R. Jones APPROVING OFFICIAL (Signature) <i>James R. Jones</i>			7. LOCATION Sumter Bldg., Room 201		8. TELEPHONE NO. 355-7294
12. RESTRICTIONS ON USE OF RECORDS, IF ANY Restricted to official use of employees of the Dept. of Emergency Asst.			10. TITLE Records Mgmt. Liaison Officer		11. DATE 7-16-71
13. SPACE CLEARED (Square Feet) a. Office 16 b. Storage 6		14. FILING EQUIPMENT EMPTYED a. Cabinets (No.) b. Shelving (Lin. Ft.) c. Other 5 transfiles		15. CUBIC FEET TRANSFERRED 26	
16. LIST OF RECORDS TRANSFERRED (ITEM 16a TO BE COMPLETED BY RECORDS CENTER)					
a. SRC Box No.	b. Agency Box No.	c. Description of Records (With Inclusive Dates)			d. Retention Sched. and Item Nos.
		This transfer comprises the files of the Bureau of Program Development which was abolished January 1, 1970. The functions of the Bureau were assigned in part to the Regional Offices and in part to the new Division of Planning in the State Capitol.			
44126	1	Emergency Planning, Administrative, 1969			Sched. No. 2 Item 1
44127-44131	2-6	Domestic Disturbance Planning, 1968-69			Item 3
44132	7	Disaster Relief Planning, 1969			Item 4
44133	8	Administrative Issuances to Field Offices on Planning Procedures, 1968-69			Item 5
44134	9	Policy Interpretations on Eligibility of County and Municipal Governments to Receive Planning Funds, 1967-69			Sched. No. 3 Item 6
44135-44136	10-11	Legislative Budget: Formulation Workpapers, 1967-69			Sched. No. 5 Item 3
44137	12	Legislative Budget: Presentations			Item 5
44138-44143	13-17	Operating Budget, 1969			Item 6
44144	18	Budget			Item 8
44145-44148	19-21	Capital Budget, 1969			Item 10

Figure 7. Transmittal and Receipt for Records Storage

FLORIDA STATE



RECORDS CENTER

FOR FURTHER INFORMATION
CALL: (904) 222-7735

DIVISION OF ARCHIVES, HISTORY
AND RECORDS MANAGEMENT
DEPARTMENT OF STATE, STATE OF FLORIDA
SECRETARY OF STATE, RICHARD (DICK) STONE
TALLAHASSEE, FLORIDA 32304

The Florida State Records Center, planned specifically for storing and servicing the State's noncurrent records, is an integral part of a statewide program designed to bring efficiency and economy to the management of Florida's public records.

The Center is actually an extension of the individual agency's recordkeeping system. Noncurrent records which have little or no administrative use but which must be retained for other reasons can be moved from high-cost office space to low-cost storage at the Center. Generally, such records can be stored in the Center for 10 percent or less of the cost of keeping them in the office.

Procedures governing the retention and storage of public records are established by the Division of Archives, History and Records Management, Florida Department of State. Administrative, legal and fiscal needs are considered in developing storage requirements as well as in establishing final disposition dates. Whenever possible, paper recycling is a primary consideration for any records slated for destruction.

The Center, built in 1971 at a cost of \$237,000 (exclusive of shelving and specialized equipment), is a one story, modular steel structure, the most modern of its type in the country. Building layout permits the addition of more storage modules without disrupting ongoing records storage activities.

The total floor area of the Center exceeds 16,000 square feet. Approximately 9,500 square feet are devoted to noncurrent records storage. The central storage core is a clear-span rectangle measuring 80 by 120 feet. It holds more than 50,000 cubic feet of records, approximately 5.3

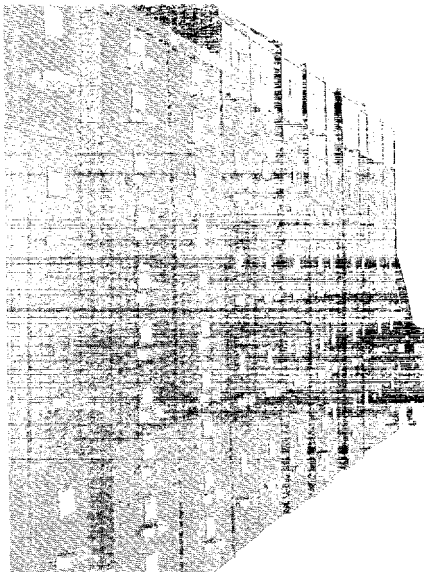
cubic feet of records per square foot of storage space, including aisles and access areas.

The building houses the Central Microfilm Service and the Computer Output Microfilm facility. Through COM, microfilm is generated directly from computer magnetic tape without the production of an intermediate paper printout. The COM room, with its environmental controls, assures tape and film handling under optimum processing conditions. A fireproof storage vault equipped with automatic temperature and humidity controls insures ideal storage facilities for more than 1,000 cubic feet of microfilm and magnetic tapes.

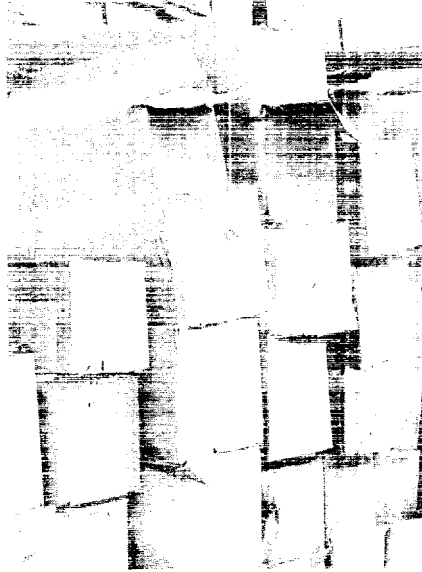
Records stored in the fireproof building are protected by a modern automatic sprinkler system. Separate heat and smoke detection devices operate independently of the sprinklers. Both the protection and detection systems are tied in with the Tallahassee Fire Department, insuring the early warning and control of any fire.

All records deposited in the facility are under maximum security. Access to the storage area is rigidly controlled, eliminating the possibility of unauthorized entry and use of records. The level of security in the Center is equal to, and in many cases better than that which the depositing agencies can offer.

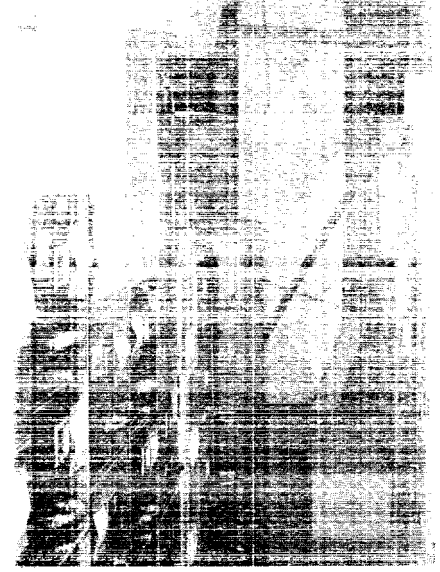
The Florida State Records Center also houses the records management analyst staff engaged in inventorying, scheduling and inspection of public records and in the design of modern paperwork systems. These functions, together with the records storage and microfilm service, provide the State with an integrated program for developing a truly efficient, economical and responsive statewide public records structure.



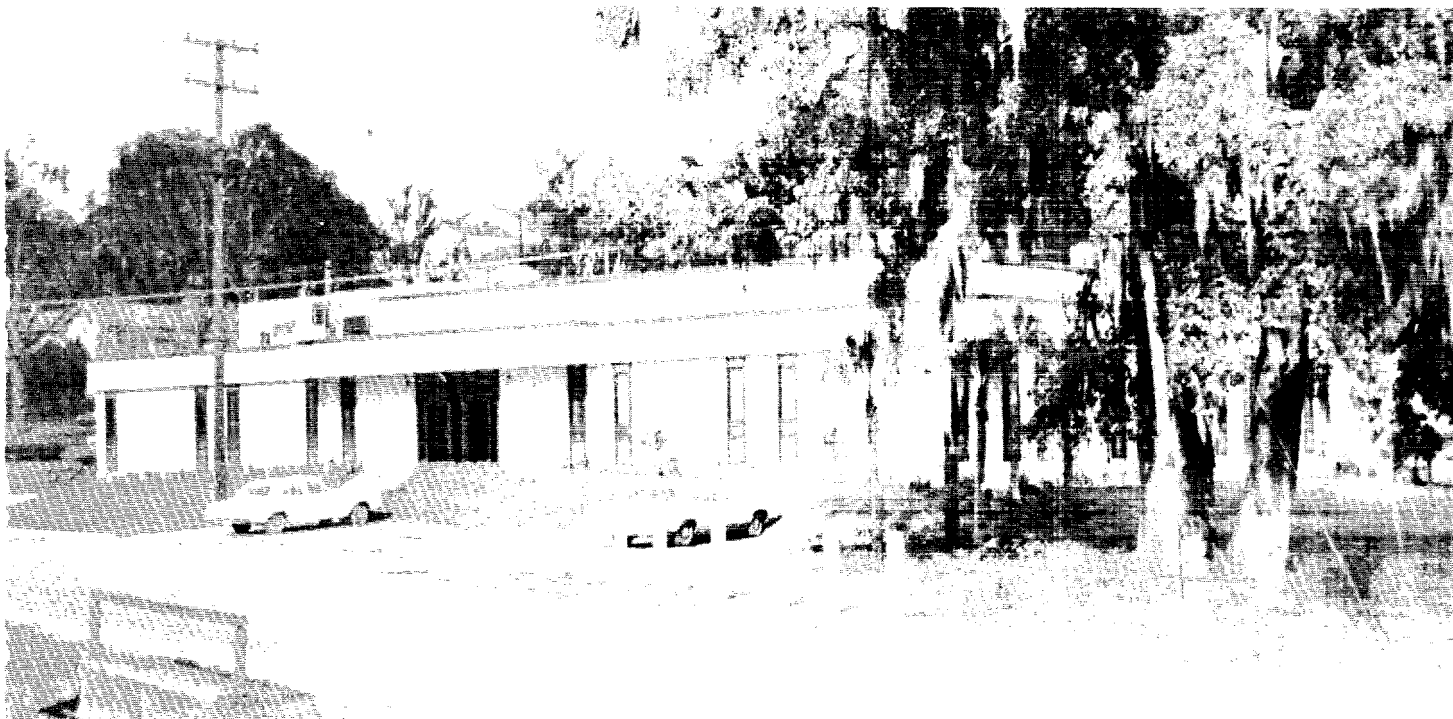
Offices . . .



warehouses . . .



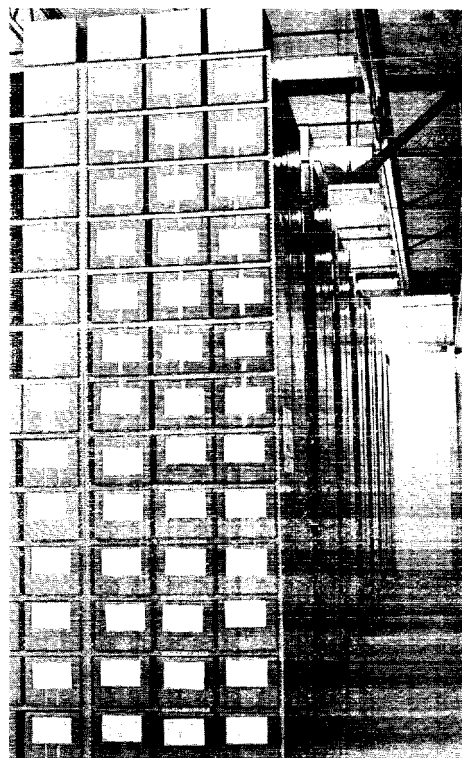
and attics



Florida State Records Center

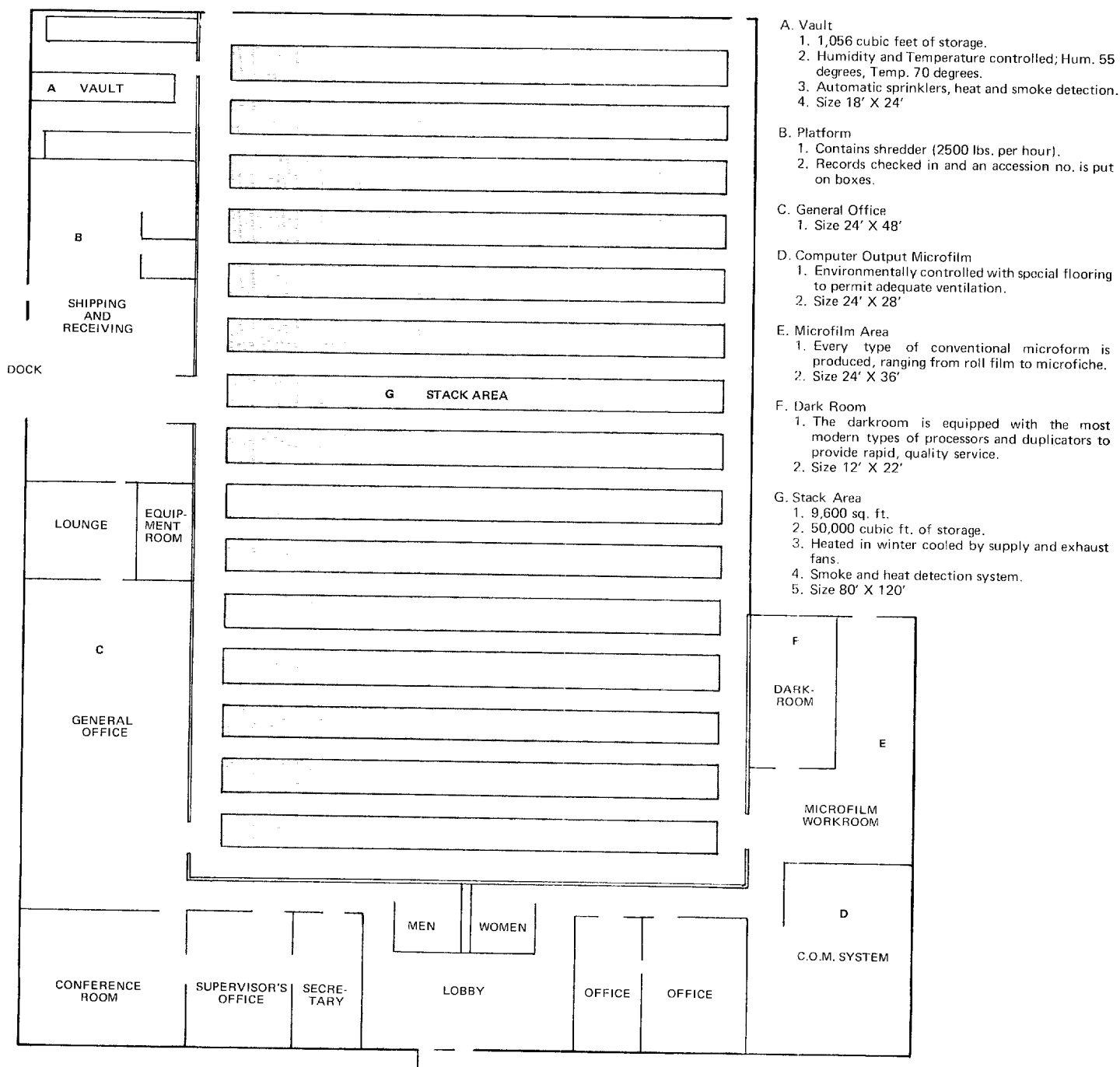
THE RECORDS CENTER PROVIDES:

- **STORAGE AT NO CHARGE** — Records are stored at *no cost* to state government agencies. Cartons and labels for storing paper records are furnished free of charge by the Center.
- **REFERENCE SERVICE** — Stored records remain the property of the depositing agency and are subject to any using restrictions set by the agency. The Center provides a nominal reference service for stored records. Requests for the records or information from the records may be made by telephone, form request or personal visit to the Center. Records may be removed on loan or permanently withdrawn by an agency at any time. Reference Service is normally provided within 24 hours after receipt of request.
- **CENTRAL MICROFILM SERVICE** — Every type of microfilm product, including Computer Output Microfilm (COM), is available. The service is available *at cost*. While the service will have the most appeal to agencies with one-time intermittent or peakload microfilming requirements, there are no restrictions as to size of job or length of project.
- **OTHER SERVICES** — *Pickup and delivery service* is provided for the Tallahassee area. The Center also has equipment for *shredding* records. Agencies having records that must be mutilated at the time of disposal can have them shredded at the Center at no cost.



Records Center

RECORDS CENTER FLOOR PLAN





STATE OF FLORIDA DEPARTMENT OF STATE Division of Archives, History and Records Management Form DS-RM 202 (6-71)		TRANSMITTAL AND RECEIPT FOR RECORDS STORAGE (CONTINUED)	FROM (AGENCY) Department of Emergency Asst. Division of Planning	PAGE 2 OF 2 PAGES
16. LIST OF RECORDS TRANSFERRED (ITEM 16a TO BE COMPLETED BY RECORDS CENTER)			DATE 7/15/71	
a. SRC Box No.	b. Agency Box No.	c. Description of Records (With Inclusive Dates)	d. Retention Sched. and Item Nos.	
44149- 44150	22-23	Time Sheets and Work Time Schedules, 1968-69	Sched. No. 3 Item 2	
44151	24	Personnel Administrative Correspondence, 1969	Item 5	
44152	25	Employee Service Case Files, 1968-69	Item 8	
44153	26	Employee Service Instruction Files, 1968-69	Item 9	

Figure 8. Transmittal and Receipt for Records Storage
(Continuation Sheet)

considerations or considerations of the public interest. If the records are restricted to official use by the transferring agency only, this item should so indicate. All restrictions dealing with access to the records will be rigidly enforced.

Item 13. Square Feet of Space Cleared. Enter the number of square feet, in either office or storage space (or both), released as a result of this transfer.

Item 14. Filing Equipment Emptied. Indicate the filing equipment released as a result of the transfer. Space is provided to show cabinets, shelving, or other specialized equipment. If the equipment is "other", indicate type.

Item 15. Cubic Feet of Records Transferred. Enter the total number of cubic feet of records being transferred; use the equivalents shown in *Figure 9*.

For example, "25-43." In such instances where the contents of each box are *not* indicated on the transfer form, reference service will be facilitated if the transferring agency will enter in the "description" block of the carton label, a brief description of the contents of the carton. It is essential that the box numbers shown on the transfer forms correspond exactly with the numbers entered on the carton labels.

Column c -- Description of Records. The description of records being transferred should be specific enough to identify them clearly and to enable the Center to provide prompt and efficient reference service. Identify each series of records being transferred by the same record series title as shown on the Records Retention Schedule, **Form DS-RM 105**. Following the record series title provide a brief statement concerning the file organization and arrangement. Also show the inclusive dates of the records being transferred.

CUBIC FOOT EQUIVALENTS	
Letter-size drawer or box _____	1.5 Cu. Ft.
Legal-size drawer or box _____	2.0 Cu. Ft.
Letter — 36" long shelf _____	2.0 Cu. Ft.
Legal — 36" long shelf _____	2.5 Cu. Ft.
3" x 5" Card, ten 12" rows _____	1.0 Cu. Ft.
3" x 5" Card, five 24" rows _____	1.0 Cu. Ft.
4" x 6" Card, six 12" rows _____	1.0 Cu. Ft.
4" x 6" Card, three 24" rows _____	1.0 Cu. Ft.
5" x 8" Card, four 12" rows _____	1.0 Cu. Ft.
Tab Card, five 14" boxes _____	1.0 Cu. Ft.
Tab Card, three 24" boxes _____	1.0 Cu. Ft.

Figure 9

Item 16. List of Records Transferred. This item has four columns:

Column a — SRC Box No. This column is reserved for Records Center use. The information will be filled in when the boxes are received at the Records Center. The copy of **Form DS-RM 201** returned to the agency will show the SRC box numbers. These box numbers and the accession number entered in Item 1 are to be used by the agency when requesting future reference service.

Column b — Agency Box No. As indicated before, boxes should be numbered consecutively to maintain the original file arrangement of the records. Enter these box numbers as shown in *Figure 7*. If a series description applies to the records in a number of boxes and there is no further box-by-box breakdown, inclusive box numbers should be entered.

Each record series needs to be listed only once. If a series fills several cartons, a breakdown of the chronological, numerical, or alphabetical coverage of each carton should be given to facilitate reference service. In such breakdowns the file designations (filing symbols, name, or date) of the first and last folders of the documents within each carton are usually sufficient.

A folder by folder or file by file coverage of each box is seldom necessary and should not be made unless it would facilitate reference. Any evident gaps in the record series should be clearly indicated.

When the records being transferred are other than *conventional* paper files, the type of recording medium should be indicated such as "microfilm", "magnetic tape", etc.

Column d — Retention Schedule and Item Nos.
So that the Center may properly store and provide timely and economical disposition of transferred records, agencies must show the Records Retention Schedule No. and the Item No. for each listed record

series. Even though schedules authorize destruction of records at the end of the specified time or following a certain event, the Center will obtain agency concurrence before the records are destroyed.

V. OBTAINING REFERENCE SERVICE

1. Service Available

Upon request, the Center will provide information from records, reproduction of records (including authenticated copies), or the loan or return of records themselves. No reference inquiry will be processed, however, if it is in conflict with restrictions established on the use of the records by the transferring agency or by law.

2. Obtaining Service

Agencies may obtain prompt and reliable reference service on records transferred to the Records Center by submitting Form DS-RM 203, Request for Reference Service (See Figure 10, to the Records Center. Only urgent or priority requests should be made by a personal visit or by telephone. Inquiries will be answered as quickly as possible; usually, within 24 hours after receipt.

3. Delivery Service

For agencies located in the Tallahassee area, the Center provides delivery service. Center delivery service will also pick up any mail destined for the Center.

When records or information are to be transmitted to agencies beyond the Tallahassee area, the requesting agency should make arrangements with the Center for desired method of delivery. Normally, it is more economical for the Center to send small quantities of records by United States mail to out of town customers. This is especially true when time is not essential and when special precautions are not needed.

4. Channeling Requests

It is desirable for an agency to have all requests for reference service channeled through a specific individual (or individuals). The Records Management Liaison Officer or a designated staff member should provide the necessary clearance. If an employee other than the Records Management Liaison Officer is

designated for clearance purposes, the name and telephone number of the employee should be given to the Center.

5. Access to the Center

Messengers sent to the Center to pick up the requested records (or information), or agency officials who make personal visits to the Center for reference service, must always provide:

- Identification as an agency representative, and
- Agency authorization to refer to the records if their use is restricted.

6. Information vs. Records

As indicated in paragraph 1 above, an agency may request the return of a record or information from the record. Usually the request for information involves less expense and effort on the part of the Center and the requesting agency. When requesting information, the agency should clearly define what information is needed and where this information may be found in the records.

When requesting information it should be remembered that the Center can report only on the facts that appear in the records and can not interpret these facts. If an interpretation is needed, the agency requiring it should either ask for the return of the record or should arrange to consult the record at the Center.

7. Reproductions

Reproductions of records can be furnished by the Center, if such reproduction is not contrary to agency or statutory restrictions. Reproductions in limited quantities will be made at no cost to the agency. However, charges will be made for reproductions involving an excessive expenditure of Center resources or unusual technical problems. A request involving more than 10 pages of reproduction may be considered excessive, particularly if the agency concerned has its own reproduction facilities.

The Center can also furnish prints from stored microfilm. However, like reproductions of paper records, only a nominal number of prints can be obtained at no cost. In those instances where a large number of prints are required, the agency can either request the return of the microfilm or arrangements can be made with the Center for supplying the prints on a reimbursable basis.

8. Telephone Requests

When requesting urgent reference service by telephone, the agency must provide the same type of information as though the request were being

submitted on Form DS-RM 203. The accession number and the SRC Box No. are particularly important, as well as any other information which will help the Center employee receiving the telephone call prepare the necessary reference request.

9. Records Research

The Center is not staffed to handle research projects in agency records. However, desk space will be provided for agency personnel performing research, and the Center staff will assist in obtaining needed records.

VI. DOCUMENTING REFERENCE REQUESTS

1. Forms Used

Form DS-RM 203, Request for Reference Service, is to be used when requesting records or information from records stored in the Center. This form, when properly filled out, provides the essential information needed by Center personnel to locate the desired records stored in the Center. (See Figure 10.)

The reference request form provides space for requesting up to 12 records or information items. The form is designed so that items requested *do not* have to have the same accession number.

Copies of Form DS-RM 203 may be obtained from the Records Center.

2. Forms Distribution

Prepare an original and two copies of each form submitted. One copy will be retained by the Center, the other two will be returned to the agency with the records or information requested. When records are loaned or withdrawn from storage, one of the copies returned to the agency is to be signed, to indicate receipt, and sent to the Records Center as official record of the loan or withdrawal.

3. Explanation of Items

Item 1. Type of Service Requested. Check the appropriate box to indicate type of service desired, e.g., temporary loan, copy of records, information from records, or permanent withdrawal. *Only one* type of service is to be requested on a form.

Item 2. Records or Information Items Requested. This item has five columns:

Column a — Item Number. Indicate the number of each record or information item requested, beginning with "1".

Column b — Description. Identify clearly the records wanted or the information desired. Remember that the only information that the reference clerk has to use in processing this request is that provided in this column.

Column c — Accession Number. Enter the accession number. This is the same number as shown in Item 1 of the Form DS-RM 201 covering the transmittal of records to the Center.

Column d — SRC Box No. Show the appropriate box number as entered in Item 16B of the transmittal, Form DS-RM 201.

Column e — SRC Code. This column is reserved for Records Center use.

Item 3. Remarks. This space may be used by either the agency or the Records Center to provide additional information regarding the requests or results of the reference search.

Items 4-7. Name of Authorized Requester, Telephone No., Location, Date. Enter here the name of the person authorized by the agency to request service from the Center. This should be the Records Management Liaison Officer or a designated staff member. Also, show the requester's telephone number, and building and room number, as well as the date of the request.

Item 8. Agency Name and Address. Show here the complete agency name and full mailing address.

Item 9. Receipt for Records Loaned or Withdrawn. When Item 1c or 1d is checked and record is returned to the agency, either as a loan or withdrawal, the agency official receiving the records signs here. The signed copy is returned to the Records Center.

STATE OF FLORIDA DEPARTMENT OF STATE Division of Archives, History and Records Management Form DS-RM 203 (6-71)		REQUEST FOR REFERENCE SERVICE		SRC CONTROL		
SEND ORIGINAL AND TWO COPIES TO: DEPARTMENT OF STATE DIVISION OF ARCHIVES, HISTORY AND RECORDS MANAGEMENT FLORIDA STATE RECORDS CENTER TALLAHASSEE, FLORIDA 32304			FOR RECORDS CENTER USE ONLY			
			LOCATION OF RECORDS			
			1	2	3	TOTAL
			TIME			
EMPLOYEE						
1. TYPE OF SERVICE REQUESTED (CHECK ONE ONLY)						
<input checked="" type="checkbox"/> a. Temporary Loan <input type="checkbox"/> b. Copy of Records <input type="checkbox"/> c. Information from Records <input type="checkbox"/> d. Permanent Withdrawal						
2. RECORDS OR INFORMATION REQUESTED						
a. Item No.	b. Description	c. Accession No.	d. SRC Box No.	e. SRC Code		
1	Administrative Issuances to Field Offices on Planning Procedures, 1968-69, (Complete carton), Agency Box No. 8	700125	44133			
2	Metro Dade County Disaster Relief Plan, 1969, (File Folder), Agency Box No. 7	700125	44132			
3	Expenses, Operating Budget, 1967, (File Folder), Agency Box No. 17	700125	44143			
4	Washington County Disaster Simulation Test, 1969, (File Folder), Agency Box No. 6	700201	27026			
3. REMARKS:						
<div style="border: 1px solid black; padding: 5px; transform: rotate(-15deg); display: inline-block;"> This figure shows Form DS-RM 203 as submitted by the agency. A copy of the form will be returned with records or information. If receipt is required, Item 9 will be checked. </div>						
4. NAME OF AUTHORIZED REQUESTER J. A. Smith		5. TEL. NO. 355-7294		9. RECEIPT FOR RECORDS LOANED OR WITHDRAWN		
6. LOCATION Sumter Bldg, Room 201		7. DATE 10-27-71		<input type="checkbox"/> If this box is checked, please sign, date and return this form to State Records Center.		
8. AGENCY (NAME AND ADDRESS) Department of Emergency Assistance Division of Planning 400 Redwood Street Tallahassee, Florida 32303		I have received the record items listed above. Signature _____ Date _____				

Figure 10. Request for Reference Service

VII. DISPOSAL OF RECORDS IN THE CENTER

1. Storage vs. Disposal

The transfer of records to inexpensive storage at the State Records Center is not a substitute for disposal. Rather it goes hand in hand with disposal. All records transferred to the Center should be scheduled and have a definite disposal date. Records to be retained less than two years should not be sent to the Center but should be retained by the agency and destroyed from agency space.

2. Disposal Objectives

Most records transferred to the State Records Center have a predetermined destruction date. Some, however, are to be retained because they have permanent or archival value. Disposition activities at the Center have three major objectives:

- To assist the State Archives in identifying the records of State Government agencies which have enduring value,
- To assist State agencies in establishing realistic retention periods for records that do not have enduring value,
- To remove promptly from the Center all records which have reached their disposal date.

3. Agency Concurrence in Disposal

Records of an agency will not be destroyed by the Center without the concurrence of the agency concerned.

4. Concurrence Procedure

Before destroying any records, the Center will prepare and send to the agency a completed Form DS-RM 107, Notice of Intent to Destroy Scheduled

Records (*See Figure 11*). This will be done just before the records concerned are eligible for scheduled destruction.

If the agency agrees that the records should be destroyed as scheduled, the agency will sign Form DS-RM 107 in Item 7 and return it to the Center for processing.

Agencies should approve the Notice of Intent to Destroy Scheduled Records unless there is an imperative reason for keeping the records beyond the scheduled destruction date. Since maintenance of noncurrent records is costly (even in center-type space), and since the value of records beyond the scheduled destruction period is generally limited, agencies should not keep records beyond the disposal date unless there is a justifiable need for their further retention.

When an agency approves the Form DS-RM 107, the form will be processed as though it had been initiated by the agency. When the disposal is approved by the Division of Archives, History, and Records Management, the Center will dispose of the records, execute the disposal certificate in Item 10 of the form, and return the signed form to the agency for its records.

5. Method of Disposal

Unless an agency specifies that records are to be shredded at time of disposal, the Center will either sell the obsolete records as waste paper or have them buried in the sanitary landfill provided by the City of Tallahassee. The burning of records is not permitted within the city limits.

Upon agency request, records of a confidential or classified nature will be shredded prior to disposal as wastepaper or burial in the sanitary landfill.

STATE OF FLORIDA DEPARTMENT OF STATE Division of Archives, History and Records Management Form DS-RM 107 (11-69)		NOTICE OF INTENT TO DESTROY SCHEDULED RECORDS AND DISPOSAL CERTIFICATE		NOTICE NO. <u>1</u> PAGE <u>1</u> OF <u>1</u> PAGES	
1. AGENCY Dept. of Emergency Asst.		2. DIVISION Planning		3. BUREAU	
4. ADDRESS Sumter Building, Room 201		5. CONTACT (NAME & TELEPHONE NUMBER) James R. Jones 355-7294			
TO: DEPARTMENT OF STATE DIVISION OF ARCHIVES, HISTORY AND RECORDS MANAGEMENT TALLAHASSEE, FLORIDA 32301		6. NOTICE OF INTENTION: The scheduled records listed in Item 8 are to be disposed of in the manner checked below: <input checked="" type="checkbox"/> a. Destruction <input type="checkbox"/> c. Other _____ <input type="checkbox"/> b. Microfilming and Destruction _____			
		7. SUBMITTED BY: <i>Robert J. Smith</i> 12-30-71 Signature and Title Date			
8. RECORD SERIES LIST					
a. Schedule No.	b. Item No.	c. Title	d. Inclusive Dates	e. Volume	f. Destruction Action and Date
3	2	Time Sheets and Work Time Sched. These records are in the State Records Center, Accession No. 700125, Agency Box No. 22, SRC Box No. 44149.	1968	1 cu.ft.	
<p>This figure shows Form DS-RM 107 completed by the Records Center and signed by the agency. At this point, the form will be submitted for disposal authorization.</p>					
9. DISPOSAL AUTHORIZATION Disposal for above listed records is authorized. Any deletions or modifications are indicated in red.			10. DISPOSAL CERTIFICATE The above listed records have been disposed of in the manner and on the date shown in Column f.		
Signature and Title		Date		Signature and Title Date Witness	

Figure 11. Notice of Intent to Destroy Scheduled Records

CHECKLIST

Read each of the questions below and check your answer, "YES" or "NO." A checkmark in the "NO" column indicates the need for corrective action.

	YES	NO
1. Has your agency designated a Records Management Liaison Officer in accordance with Chapter 1A-21, Florida Administrative Code?	<input type="checkbox"/>	<input type="checkbox"/>
2. Are all the records of your agency covered by records retention schedules?	<input type="checkbox"/>	<input type="checkbox"/>
3. Do the records retention schedules of your agency indicate what records should be transferred to the State Records Center, and when?	<input type="checkbox"/>	<input type="checkbox"/>
4. Are "desk drawer files" or "personal files" scrutinized for record material to be incorporated for record material to be incorporated in official files before the files are transferred to the State Records Center?	<input type="checkbox"/>	<input type="checkbox"/>
5. Does your agency utilize the knowledge and expertise of staff members of the State Records Center in making transfers of records to the Center?	<input type="checkbox"/>	<input type="checkbox"/>
6. Does your agency include finding aid in transfers of records?	<input type="checkbox"/>	<input type="checkbox"/>
7. Does your agency transfer to the Center those noncurrent records which must be retained for two or more years?	<input type="checkbox"/>	<input type="checkbox"/>
8. Does your agency screen records before packing them for shipment?	<input type="checkbox"/>	<input type="checkbox"/>
9. When your agency requests reference service, does it cite the State Records Center accession number and box number?	<input type="checkbox"/>	<input type="checkbox"/>
10. Are telephone and "in-person" requests for reference service made only when urgent? ..	<input type="checkbox"/>	<input type="checkbox"/>

STATE OF FLORIDA DEPARTMENT OF STATE Division of Archives, History and Records Management Form DS-RM 107 (11-69)		NOTICE OF INTENT TO DESTROY SCHEDULED RECORDS AND DISPOSAL CERTIFICATE		NOTICE NO. <u>1</u> PAGE <u>1</u> OF <u>1</u> PAGES	
1. AGENCY Dept. of Emergency Asst.		2. DIVISION Planning		3. BUREAU	
4. ADDRESS Sumter Building, Room 201		5. CONTACT (NAME & TELEPHONE NUMBER) James R. Jones 355-7294			
TO: DEPARTMENT OF STATE DIVISION OF ARCHIVES, HISTORY AND RECORDS MANAGEMENT TALLAHASSEE, FLORIDA 32301		6. NOTICE OF INTENTION: The scheduled records listed in Item 8 are to be disposed of in the manner checked below: <input checked="" type="checkbox"/> a. Destruction <input type="checkbox"/> c. Other _____ <input type="checkbox"/> b. Microfilming and Destruction _____			
		7. SUBMITTED BY: <i>Redford Smith</i> Signature and Title		12-30-71 Date	
8. RECORD SERIES LIST					
a. Schedule No.	b. Item No.	c. Title	d. Inclusive Dates	e. Volume	f. Disposal Action and Date
3	2	Time Sheets and Work Time Sched. These records are in the State Records Center, Accession No. 700125, Agency Box No. 22, SRC Box No. 44149.	1968	1 cu.ft.	
<div style="border: 1px solid black; padding: 5px; transform: rotate(-10deg);"> This figure shows Form DS-RM 107 completed by the Records Center and signed by the agency. At this point, the form will be submitted for disposal authorization. </div>					
9. DISPOSAL AUTHORIZATION Disposal for above listed records is authorized. Any deletions or modifications are indicated in red.			10. DISPOSAL CERTIFICATE The above listed records have been disposed of in the manner and on the date shown in Column f.		
_____ Signature and Title		_____ Date		_____ Signature and Title Date Witness	

Figure 11. Notice of Intent to Destroy Scheduled Records

CHECKLIST

Read each of the questions below and check your answer, "YES" or "NO." A checkmark in the "NO" column indicates the need for corrective action.

- | | YES | NO |
|--|--------------------------|--------------------------|
| 1. Has your agency designated a Records Management Liaison Officer in accordance with Chapter 1A-21, Florida Administrative Code? | <input type="checkbox"/> | <input type="checkbox"/> |
| 2. Are all the records of your agency covered by records retention schedules? | <input type="checkbox"/> | <input type="checkbox"/> |
| 3. Do the records retention schedules of your agency indicate what records should be transferred to the State Records Center, and when? | <input type="checkbox"/> | <input type="checkbox"/> |
| 4. Are "desk drawer files" or "personal files" scrutinized for record material to be incorporated for record material to be incorporated in official files before the files are transferred to the State Records Center? | <input type="checkbox"/> | <input type="checkbox"/> |
| 5. Does your agency utilize the knowledge and expertise of staff members of the State Records Center in making transfers of records to the Center? | <input type="checkbox"/> | <input type="checkbox"/> |
| 6. Does your agency include finding aids in transfers of records? | <input type="checkbox"/> | <input type="checkbox"/> |
| 7. Does your agency transfer to the Center those noncurrent records which must be retained for two or more years? | <input type="checkbox"/> | <input type="checkbox"/> |
| 8. Does your agency screen records before packing them for shipment? | <input type="checkbox"/> | <input type="checkbox"/> |
| 9. When your agency requests reference service, does it cite the State Records Center accession number and box number? | <input type="checkbox"/> | <input type="checkbox"/> |
| 10. Are telephone and "in-person" requests for reference service made only when urgent? .. | <input type="checkbox"/> | <input type="checkbox"/> |